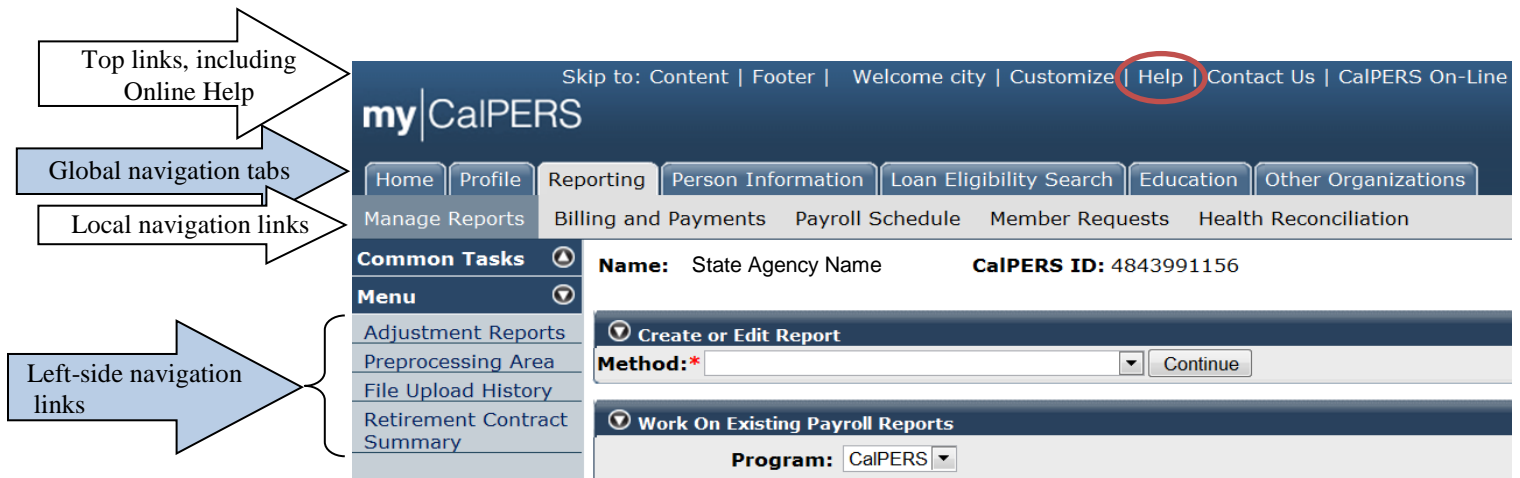


# my|CalPERS Online Data Entry Help Sheet

## Health for State Agencies



### my|CalPERS Navigation

- **Online Help:** Provides detailed information and required steps needed to utilize my|CalPERS
- **Global Navigations Tabs:** Provide access to high level functions within my|CalPERS
  - **Profile Tab** – employer demographics, contacts, business Relationships, contracts, and Agreements
  - **Reporting Tab** - reporting retirement enrollments, health enrollments, and payroll transactions
  - **Person Information Tab** – search for person details by SSN or CalPERS ID
  - **Other Organizations Tab** – general PERS-related information
- **Local Navigation Links:** Provide access to specific pages within my|CalPERS
- **Left-Side Navigation Links:** Provide supporting access or access to common tasks
- **Multiple Browser Windows:** *e.g. one for query, one for processing transactions*
  1. Right click on any of the global navigation tabs.
  2. From the pop-up dropdown, select *Open in New Window*.
  3. A separate browser window will open.
- Selecting the **Home** global navigation tab, or the top-left **my|CalPERS** link, will refresh the data. It's important to refresh when performing a query or new transaction for a different Participant. This is not necessary when working with the **Reporting** global navigation tab .
- The Internet browser **Back arrow** or **Backspace key** will return you to the previous screen; however, it might create an occasional error page, especially after you save your transaction.

### Health Transactions:

To begin processing transactions, select the **Reporting** global navigation tab. Within the *Create or Edit Report* section (see the screen shot at the top of this Help Sheet), select “Add or Edit Health Enrollment” from the dropdown.

### Health Transactions Quick Tips:

- **Add New** button: Used to process a new *transaction* (not necessarily a New Enrollment)
- **Open Enrollment transactions (new enrollment, change health plan, add or delete dependents, and cancel coverage):** From the Health Event Type field, select “Open Enrollment” from the dropdown before selecting the Health Event Reason
- **Rescissions:** Can only be done by employers if transaction is:
  - permissive with a future effective date, or
  - in pending-analyst-review status

# my|CalPERS Online Data Entry Help Sheet

## Health for State Agencies

### Health Transactions (cont.)

- **Pending Retirement Health Coverage:** If there is a pending retirement and the participant needs health coverage, once the health is canceled, process a Direct Pay by using:
  - **Health Event Type:** Continued Enrollment
  - **Health Event Reason:** Pending Retirement
- **Query (to view current or future health enrollment information):**

Home	Profile	Reporting	Person Information	Loan Eligibility Search	Education
Summary	Health Enrollment	Benefit Application			
<b>Common Tasks</b>					
<b>Select Health Account</b>					
Health Account	Qualifying Participant Name	Qualifying CalPERS ID			
<a href="#">CalPERS Employment</a>	John Doe	5124365523			
<a href="#">Health Account Summary</a>					

1. Select **Person Information** global navigation tab
2. Enter the employee's CalPERS ID or Social Security number in the SSN / Federal or Individual Tax ID field, then select **Search** button
3. Select the **Health Enrollment** local navigation link  
(**Note:** Only select **Health Account Summary** link for high-level health information, such as the health plan name and party rate)
4. Select the **CalPERS Employment** link \* for detailed enrollment information such as history, dependents, deductions, future, and pending transactions  
\*This link will not always display as **CalPERS Employment**. It could be different depending on the participant's status i.e., "CalPERS Retiree.")

### Dental

The process of continued **dental coverage into retirement** hasn't changed.

- Complete the Dental Plan Enrollment Authorization Form (STD692) for the employee and send the hard copy to CalPERS when an employee is continuing dental benefits into retirement
- Functionality for online processing of dental enrollment in my|CalPERS is planned for a future enhancement

### Vision

The process of continued **vision coverage into retirement** hasn't changed.

- It is not updated through my|CalPERS
- It is continued directly through the vision carrier with the premium deducted from the retired warrant as a direct authorization deduction

## my|CalPERS Online Data Entry Help Sheet

### Health for State Agencies

#### Disabled Dependent

The my|CalPERS process for a new health enrollment with a disabled dependent:

1. Employer receives the health enrollment form for a new employee with a disabled dependent
2. Employer completes the new enrollment transaction in my|CalPERS for the employee and all dependents except the disabled dependent
3. Employer keys a second transaction for the disabled dependent using:
  - **Health Event Type:** Add Dependent
  - **Health Event Reason:** Medically Disabled
4. my|CalPERS will send a Member Questionnaire Form and a Medical Report Form to the member
  - Employee will complete the Member Questionnaire and return it to CalPERS
  - The Medical Report should be given to the disabled dependent's physician

*(Note: The Medical Report instructs the physician to fax or mail it directly to CalPERS.)*

5. The transaction will be placed in "pending analyst review" status
6. A notice will be sent to the subscriber and employer, and the health Carrier will receive notification via an electronic file.

#### Help Options:

- **Online Help:** Select **Help** link at top of page, then select **Index** to do keyword search by topic
- **Call CalPERS:** Call toll free at **888 CalPERS** (or **888-225-7377**)
- **Review the computer-based training (CBT) courses:** Register for courses from the PERT area of CalPERS On-Line
- **Email CalPERS:** Select **Ask CalPERS** within CalPERS On-Line

*(Note: In order to protect the confidential information of our members, **do not** include a Social Security number in your email or your inquiry will not be processed.)*

- **Submit an "Inquiry" within my|CalPERS:** Allows *confidential* information (such as SSNs, employee enrollment details, etc.) to be transmitted securely, and will be assigned to CalPERS staff to work.
  1. Select the **Common Tasks** left-side navigation heading.
  2. Select the **Submit Inquiry** local navigation link.
  3. Submit your Inquiry.
  4. CalPERS staff will review and respond to the Inquiry.
  5. You will be sent an email notification when the response is available.
  6. Select the **Inquiry List** local navigation link to view the response.